Inactive Pension Policies

FSRA is actively reviewing all FSCO regulatory direction, including but not limited to forms, guidelines and FAQs.

Until FSRA issues new regulatory direction, all existing regulatory direction remains in force.

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Access to Information

- I150-500 - Freedom of Information and Protection of Privacy Act (FOIPOP), How to Obtain Information (updated) When Published Size:19 kb
- I150-600 - Freedom of Information and Protection of Privacy Act (FOIPOP), Interim Administrative Practice, FOIPOP 1987 s. 17 When Published Size:24 kb
- I150-700 - Items Marked "Private" and "Confidential", PBA 1990 ss. 29(1) Effective When Published Size: 213 kb
- I150-805 - Members' Annual Statement, PBA 1990 s. 27 Effective When Published Size: 210 kb

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- AGN-002 - Determination of the Solvency Liability Adjustment Size: 267 kb

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Actuarial Reports

- A050-075 - Change to Actuarial Review Procedure 11/19/1991 Size:14 kb
- A050-100 - Compliance With Actuarial Professional Standards When Published

Scheduled Online Service Disruption Notice

Please consult our **outage schedule** for more details.

Size:29 kb

- **A050-102 - Actuarial Assumption Guidelines for Final Average Plans - Approval of Actuarial Reports 10/31/1989** Size:45 kb
- **A050-103 - Actuarial Assumptions Guidelines - Solvency Valuations 12/01/1993** Size:14 kb

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- **A200-100 - Consulting and Actuarial Fees for Bargaining Purposes Not Payable from Pension Fund, PBA 1987 ss. 23(9) Effective When Published** Size: 157 kb
- **A200-201 - Expenses Payable from Pension Fund (formerly A200-900) Effective When Published** Size: 161 kb
- **A200-400 - Finders Fee or Insurance Broker Commission Payable from Pension Fund, PBA 1987 s. 22 Effective When Published** Size: 211 kb
- **A200-800 - Payment on Wind-up, PBA 1987 ss. 71(2) When Published** Size:15 kb
- **A200-801 - Costs for Wind Up and Surplus Applications 03/31/2005** Size:25 kb
- **A200-802 - Costs for Wind Up and Surplus Applications** Size: 158 kb

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- **A300-150 - Role and Responsibilities** Size: 118 kb
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- **A300-300 - Insurance Company Not Administrator for Annuity Contracts, PBA 1987 ss. 8(d) When Published** Size:30 kb
- **A300-400 - Mandatory for MEPPs Established by Collective Agreements or Trust Agreements, PBA 1987, c.8(1)(e) 06/26/1991** Size:16 kb

- **A300-500 - Communications Between PCO and Plan Administrators** Size:36 kb
- **A300-502 - Approved Pension Forms** Size:151 kb
- **A300-800 - Requirement to Provide Information to Members When Published** Size: 144 kb
- **A300-801 - Requirement to Make Documents Available on Request, PBA 1987 s. 30 Effective When Published** Size: 107 kb
- **A300-806 - Electronic Communications Between Plan Administrators and Plan Beneficiaries** Size: 148 kb

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- **A400-850 - Registration of Amendments, Effective Nov. 1, 1992 11/01/1992** Size:22 kb
- **A400-900 - Surplus Withdrawal Amendments** Size:192 kb

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- **A500-100 - Fees Due Whether Application of Registration Filed & Late Filing Fees, PBA 1987 ss. 9(1) When Published** Size:20 kb
- **A500-105 - Deadlines for Filing AIRs with Fees, PBA 1987 s. 21 When Published** Size:47 kb
- **A500-106 - Filing Deadlines for Plans Other than Defined Contribution Plans When Published** Size:16 kb
- **A500-150 - Forms When Published** Size:49 kb
- **A500-151 - Information About Replacement AIRs & PBGF Assessment Certificates When Published** Size:49 kb
- **A500-175 - Failure to File When Published** Size:43 kb

- **A500-200 - Late Fees (see A500-151) When Publishes** Size:45 kb
- **A500-203 - Late Filing Fees, PBA 1990, s. 20, O. Reg. 909 s. 18 When Published** Size:48 kb
- **A500-205 - Late Filing Fees - How to Calculate Interest on Overdue Annual Filing Fee Payments, PBA 1990, s. 20, O. Reg. 909 s. 18 When Published** Size:67 kb
- **A500-206 - Late AIR Filing Fees - Updated Interest Table, 1997 When Published** Size:17 kb
- **A500-210 - Interest on Late AIR Fees (formerly I200-700) When Published** Size:47 kb
- **A500-225 - New Fees, effective December 17, 1992, O. Reg. 778/92 12/17/1992** Size:56 kb
- **A500-250 - Revenue Canada Annual Information Return When Published** Size:16 kb
- **A500-300 - Notice of Revised Annual Information Return, effective July 19, 1991, O. Reg. 402/91 07/19/1991** Size:21 kb
- **A500-400 - General Information Regarding Annual Information Returns and Fees** Size: 102 kb
- **A500-401 - General Information Regarding Annual Information Returns and Pension Assessments** Size: 234 kb
- **A500-800 - Which AIRs Required at Wind Up When Published** Size:48 kb
- **A500-900 - Unsigned AIRs When Published** Size:47 kb

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- **A600-600 - Guaranteed Annuity Contracts, O. Reg. 629/92, effective October 9, 1992 10/09/1992** Size:13 kb
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- **A600-950 - Mortality Tables and Sex Discrimination, O. Reg. 708/87 ss. 18(3) When Published** Size:16 kb

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- **A700-127 - Asset Transfer - Successor Plans** Size: 120 kb
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- **A700-152 - Types of Asset Transfers (Effective When Published)** Size:31 kb
- **A700-153 - Asset Transfers Between Insurance Contracts or Policies (Effective When Published)** Size:37 kb
- **A700-175 - Interim Transfer of Assets on Purchase and Sale** Size: 145 kb
- **A700-225 - Superintendent Consent Required for Asset Transfer under ss. 81(8)(PBA 1990) When Published** Size:22 kb
- **A700-250 - Asset Transfers Under Section 81 - Superintendent's Consent Required 11/23/1995** Size:45 kb
- **A700-300 - Superintendent Consent to Transfer of Assets (Sale before 1/1/88, Transfer after 1/1/88) When Published** Size:13 kb

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- **B100-125 - Garnishment of Pensions In Pay, PBA 1990, s. 66, Effective When Published Size:153 kb**
- **B100-150 - Form of Benefit Payment, Effective When Published** Size:155 kb
- **B100-200 - Pregnancy and Parental Leave, July 1991 Bulletin 2/2 p. 4 (revised by erratum) When Published** Size:23 kb
- **B100-202 - Pregnancy and Parental Leave - Employee Contributions When Published** Size:19 kb
- **B100-204 - Pregnancy and Parental Leave Governed by Employment Standards Amendment Act When Published** Size:15 kb

- **B100-205 - Pregnancy and Parental Leave Cannot be Conditional When Published** Size:15 kb
- **B100-225 - Portability Rights If Vested But Not Locked-In**
- **B100-250 - Improvement of Benefits in On-going Plans, PBA 1987 ss. 27(1) 10/31/1991** Size:15 kb
- **B100-400 - Union Membership As Condition For Benefit Improvement, Effective When Published** Size:152 kb
- **B100-800 - Same-Sex Spousal Benefits; Leshner Ruling Explained 08/31/1992** Size:17 kb
- **B100-850 - Survivor Benefit Waived, PBA 1990, s. 44 When Published** Size:18 kb
- **B100-900 - Transfer to Locked In RRSP May Result in Loss of Rights When Published** Size:18 kb

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- **C100-300 - Class and Eligibility, PBA 1987, ss. 32(1), s. 35 Effective When Published** Size:207 kb
- **C100-650 - Individuals Effective When Published** Size:103 kb
- **C100-700 - More Advantageous Pension Benefits or Ancillary Benefits Permitted - PBA, 1987 s. 5** Size:169 kb
- **C100-800 - Requirements for Full and Part-Time Employees, PBA 1987 s. 35 Effective When Published** Size:106 kb
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- **D050-800 - Extension of Deadline for Funding in Active Defined Benefit Plans, PBA 1987 s. 106, effective December 19, 1991 12/19/1991** Size:12 kb
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- **E100-003 - Results of Charges Laid under the PBA and Regulations PBA 1990 s. 62 O. Reg. 909 ss. 70(1) when Published** Size:20 kb
- **E100-004 - Charges Laid under the PBA and Regulations 10/29/1996** Size:24 kb
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- **F100-150 - CICA Guideline for Annual Audited Statements 03/01/1992** Size:63 kb
- **F100-300 - Master Trust Arrangements** Size: 165 kb
- **F100-400 - Fund Statements or Plan Statements, O. Reg. 708/87 s. 72 When Published** Size:87 kb
- **F100-401 - Revised Filing Requirements, O. Reg 712/92, effective November 26, 1992 11/26/1992** Size:12 kb
- **F100-900 - Requirement for Auditor's Report, O. Reg. 909, s. 76, s. 80 When Published** Size:16 kb

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- **I400-306 - The Use of Derivatives in Pension Funds 07/01/1995** Size:23 kb
- **I400-350 - Ethical Investments When Published** Size:15 kb
- **I400-400 - Investment in a Limited Partnership, O. Reg. 909 s. 70, 71 When Published** Size:19 kb
- **I400-500 - Letters of Credit as Collateral in Securities Lending, O. Reg. 708/87 ss. 73(b). When Published** Size:25 kb
- **I400-600 - Prudence, PBA 1987 s. 23, 63, O. Reg. 708/87 s. 63 When Published** Size:36 kb

- **I400-700 - Securities Investments, O. Reg. 708/87 s. 75 When Published** Size:24 kb
- **I400-800 - Compliance with Federal Investment Regulations or Ontario Investment Rules - Regulation 909, ss. 77(4) and 77(5), as amended 03/03/2000** Size:19 kb
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- **L050-200 - Shortened Life Expectancy - Provision in Plan Text, PBA 1990, s. 49 O. Reg. 909 c. 21(2)(d) When Published** Size:20 kb
- **L050-201 - Shortened Life Expectancy - Verification Required by Financial Institution, PBA 1990 ss. 42(11) When Published** Size:20 kb
- **L050-500 - LIF Explanation and Tables for Minimum & Maximum Withdrawal Percentages O. Reg. 909 s. 18 & 19 and Schedule 1 09/18/1992** Size:150 kb
- **L050-501 - Amendments to the ITA (Canada) Regulation and the Effect on LIFs When Published** Size:69 kb
- **L050-502 - Life Income Update and Revised Schedule 1 of Reg. 909 1994** Size:90 kb
- **L050-510 - No Provision for Small Amounts When Published** Size:17 kb
- **L050-600 - Direct Transfer from Plan to LIF, Income Tax Act (Canada) s. 147.3, effective June 10, 1993 06/10/1993** Size:75 kb
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- **L050-700 - Spousal Death Benefit, O. Reg. 909, Schedule 1, ss. 8(1) When Published** Size:87 kb
- **L050-701 - Spousal Pre-Retirement Death Benefit, O. Reg. 564/92 09/18/1992** Size:94 kb
- **L050-702 - Spousal Consent Required When Published** Size:78 kb
- **L050-703 - Spousal Consent Form, O. Reg. 909, Schedule 1 When Published** Size:103 kb
- **L050-875 - Locked-In LIFs and LIRAs Approved by Other Jurisdictions When Published** Size:20 kb
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- **L200-300 - Life Income Funds (LIFs) 03/01/2003** Size:81 kb
- **L200-301 - Schedule 1 Life Income Funds (Old LIFs)** Size: 317 kb
- **L200-302 - Schedule 1.1 Life Income Funds (New LIFs)** Size: 330 kb
- **L200-400 - 2004 LIF Maximum Payment Amount Table 01/01/2004** Size: 101 kb

- **L200-401 - 2005 LIF Maximum Payment Amount Table 01/01/2005** Size:100 kb
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- **M100-500 - Mandatory vs Voluntary, PBA 1987 s. 10, 26 Effective When Published** Size:134 kb
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